4.4 ITEM by ID

Introduction

The Item by ID screen allows you to:

➤ View and edit ID data for a specified item

➤ Specify the order in which ID data is displayed for an item: ascending ID or descending item value

➤ Specify where clause to limit the number of cases accessed for review (i.e., only display cases where Item $x > 1,000,000$)

➤ View item totals for a specified stat period

➤ View current-to-prior period ratios for item totals

➤ View an individual IDs percent of the item total

➤ View different versions (weighted, adjusted, reported, edited) of the item data

You may review data for up to 3 statistical periods. This includes the default stat period specified in User Setup, and up to 2 additional stat periods specified in the Review and Correction Main Menu screen. You may select any form in which to display the data (reported, edited, adjusted, weighted).

Accessing the Screen

- Click on the REVIEW AND CORRECTION button from the StEPS Main Menu.

- From the Review and Correction Main Menu, choose a selection set to process. (See Chapter 4.1 for more information on accessing and creating selection sets.)

- Select the GOTO pmenu option.

- Select "Item Data".

- Select "Item by ID".

NOTE: You may also access the Item by ID screen from any of the other Review and Correction screens by using the GOTO pmenu option. If you position the cursor on a specific item in one of these other screens (prior to selecting the GOTO pmenu option), the program will take you to the Item by ID screen for that item.

Figure 4.4   Item by ID screen

4.4.1   HEADER SECTION

The Item by ID screen consists of 2 parts: a Header section and an Item Data section. The Header section displays the survey, stat period, selection set, and item currently being processed. It allows you to select the sort for how data will be displayed on the screen. It allows you to specify a 'where clause' to limit the data displayed. It also allows you to specify which data items (e.g., data flags, edited version of data, reported version of data, imputation flags) to display.

The Data section displays item data (for the item specified in the Header) for each ID in the selection set or for each ID meeting the criteria specified in the where clause.

Variables displayed in the Header section are listed below in alphabetical order:

DESCRIPTION

Displays the label for the specified item, as defined in the Item Data Dictionary.

ITEM

- Displays the item associated with the ID data on the screen.
- You can access a specific item in the survey by:

    1. Keying an item in the Item field and pressing <ENTER>.
    2. Clicking on the arrow next to the Item field to bring up a pick list of all items in the survey.

        - The items and corresponding labels are displayed in the same order as they appear in the Item Data Dictionary.

        - The vertical scroll bar on the right side of the pick list will allow you to scroll through items in the survey.

        - Choose an item by clicking on it with the mouse.

    3. Pressing the F4 or F5 keys. F4 will take you to the previous item and F5 will take you to

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the next item in the survey.

4. Clicking on the UTILITIES pmenu option and choosing "Next item" or "Previous item".

SELSET

- Displays the filename of the selection set currently being processed. (See Chapter 4.1 for more information regarding selection sets.)
- Click on the SELSET field to display a description of the selection set.
- Field not correctable.
- To access a different selection set or create a new one, return to the Review and Correction Main Menu.

STAT PERIOD

- Displays the default stat period currently being processed.
- Field not correctable.
- To change the stat period, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).

SURVEY

- Displays the survey currently being processed.
- Field not correctable.
- To change the survey, you must access the Survey Selection screen from USER SETUP (See Chapter 1.1).
- Click on the survey field to display the survey name.

4.4.2   SORT OPTIONS

You may choose to have the item data displayed on the screen in one of 2 ways:

1. Ascending ID order
2. Descending current value ('current' refers to the current statistical period of the data being processed)

Click on the sort option you wish to select. 'Ascending ID' order is the default.

4.4.3   WHERE CLAUSE OPTIONS

You may enter a 'where clause' to limit the number of IDs displayed on the screen. Select the option, "All IDs in selection set" to display all IDs in the selection set that have data for the item specified in the Header section. This is the default.

Select the "Subset IDs with where clause" to limit the number of IDs displayed on the screen. For instance, you may only want to see those IDs that have imputed values for item *x* or only those IDs that have values for item x > 10,000,000. Choosing this option will access the StEPS Standard Where Clause screen:
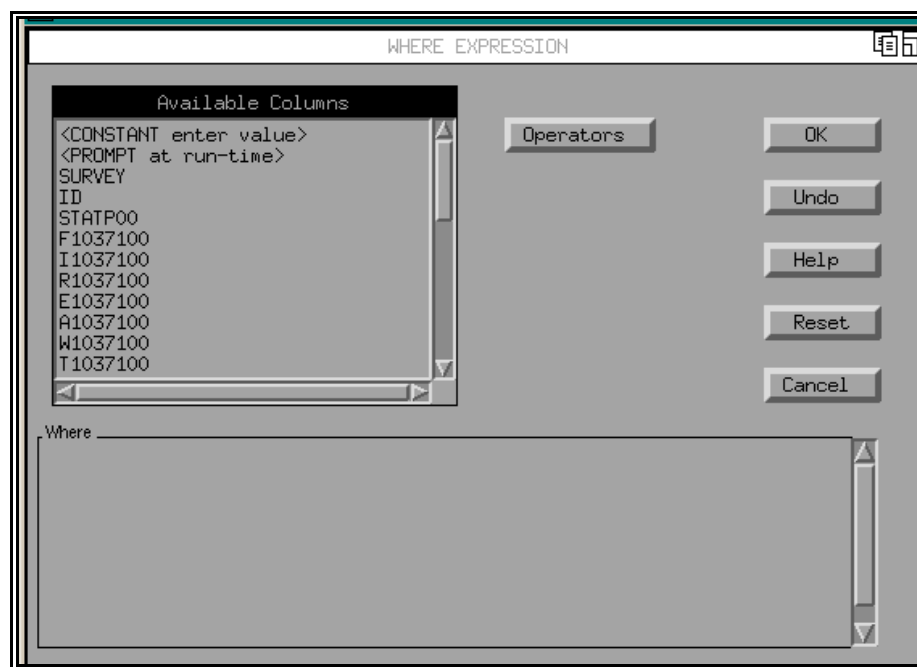

Figure 4.4.3   StEPS Standard Where Clause

- To create a "where clause", you must select a variable (from the "Available Columns" box), choose an operator, and select a constant. For example, if you wanted to view only those items where the current stat period item value > 1,000,000 (E1037100 is the variable, 'GT' is the operator and '1,000,000' is the constant), you would do the following:

1. Select "E1037100" from the "Available Columns" box.
2. Click on "Operators" to bring up a pick list of available operators (i.e., EQ, NE, GT, GE, LT, LE).
3. Click on "GT" (greater than).
4. Click on "<CONSTANT enter value>" from the "Available Columns" box.
5. Another box will display. Enter the constant "1,000,000" and click on "OK".
6. Rather than selecting "<CONSTANT enter value>" as indicated in #4, above, you may select "LOOKUP" to display a pick list of specific item values from which to choose.

   NOTE: CLICK ON THE HELP BUTTON TO ACCESS HELP INFORMATION ON USING THIS SCREEN.

● You may choose a single variable or a combination of variables and operators to build your where clause.

● As you build your "where clause", it will be displayed in the "Where" box, at the bottom of the screen. Choose a button from the right side of the screen to do the following:

   OK   Submit where clause
   UNDO   Remove the last variable, operator, or constant from the where clause
   HELP   Access HELP information on using this screen
   RESET   Clear your current where clause
   CANCEL   Do not submit the where clause; return to the Notes screen

● The variables listed in the "Available Columns" box are from the Item file.

   ID   Identification number which denotes a specific case in the survey
   STATP00   Current statistical period
   E<item>00   Edited version of the data for the current stat period
   R<item>00   Reported version of the data for the current stat period
   A<item>00   Adjusted version of the data for the current stat period
   W<item>00   Weighted version of the data for the current stat period
   F<item>00   Item data flag (associated with item value) for current stat period
   I<item>00   Item imputation flag (associated with item value) for current stat period
   T<item>00   Percent of the item total that an individual case makes up (current period)
   P<item>01   Percent change in item value between the current and prior stat period for an individual case ID
   NAME1   Name associated with case ID (i.e., company name)

   The suffix '00' indicates the current stat period; '01' indicates 1 stat period back; '02' indicates 2 stat periods back.

   NOTE: If you have submitted a where clause and want to create another, you must select the "All IDs in selection set" option and then <u>reselect</u> the "Subset IDs with where clause" option.

4.4.4 DISPLAY OPTIONS

You may specify what item data you wish to have displayed on the screen. Display options include name of the respondent, data flags, different versions of the data, imputation flags, percent of total, and percent change. Click on the arrow next to the Display Options field to display the following:
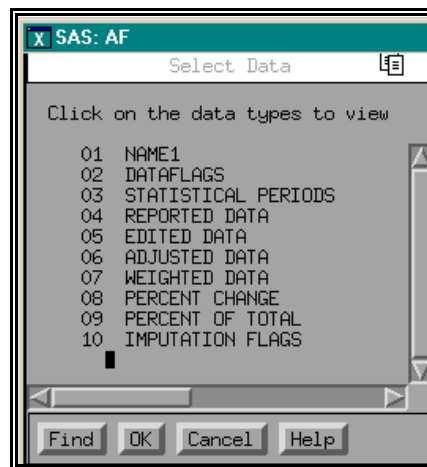
```
X SAS: AF
                Select Data          ▯▤

Click on the data types to view

   01  NAME1
   02  DATAFLAGS
   03  STATISTICAL PERIODS
   04  REPORTED DATA
   05  EDITED DATA
   06  ADJUSTED DATA
   07  WEIGHTED DATA
   08  PERCENT CHANGE
   09  PERCENT OF TOTAL
   10  IMPUTATION FLAGS
       ▮

  Find   OK   Cancel   Help
```

Figure 4.4.4   Select Display Options Screen

● Click on an option to select it. An * will appear to the left of the option to indicate it has been selected. Click on the option a second time to de-select it.

● The options available for display include the following:

01	NAME1	Name of the respondent represented by a specified ID
02	DATAFLAGS	Data flag associated with a specific item value
03	STATISTICAL PERIODS	Statistical period (i.e., 1997A1) of the item value displayed
04	REPORTED DATA	Reported version of the item data
05	EDITED DATA	Edited version of the item data
06	ADJUSTED DATA	Adjusted version of the item data
07	WEIGHTED DATA	Weighted version of the item data
08	PERCENT CHANGE	Percent change of an item value between 2 stat periods
09	PERCENT OF TOTAL	Individual ID's percent of the total item value
10	IMPUTATION FLAGS	Imputation flag associated with a specific item value

4.4.5 ITEM DATA SECTION

The Item Data section will contain ID data for the item specified in the Header section.   Data is displayed for the current stat period, as well as for any prior stat periods specified in the Review and Correction Main menu. Other information is displayed as specified from the Display Options list.

TOTAL

In the first row of the Item data table (just below the column headings) are the item totals. Item totals are displayed for each stat period and for each data version (reported, edited, adjusted, weighted) selected from the display options list.

ID

The ID associated with the item data on the screen.

- Only those IDs in the selection set or those meeting the 'where clause' criteria (if one was specified) are displayed.
- ID will always be displayed. The items (columns) that follow are optional, depending on what is selected as the display options.
- ID will always be displayed in Column 1. The position of the other display items will vary.

ITEM DATA VALUES (E<item>00, A<item>00, W<item>00, R<item>00)

Data values are displayed for the current stat period and any prior stat periods specified in the Review and Correction Main Menu screen. Which version of the data is displayed depends on the "display options" chosen.

- Only the "edited" version (e<item>*xx*) of the data is correctable.

DATA FLAGS (D<item>00)

Associated with each item value is a data flag. Data flags are used to identify the source of the edited data item value. (See Section 4.2.2 for a complete list of data flags and corresponding

definitions.)

- When you edit item data, the Data Flag screen will automatically display. Press <ENTER> to select the default flag of 'A' for 'analyst correction'.

- If you do not want to use the default data flag, select another using the mouse. Some data flags are set by various programs within StEPS. You may only change data flags that are correctable by 'analysts' (See the "Set by" column in the Data Flag table in Section 4.2.2)

- You cannot change a data flag unless you have edited the item data.

STATISTICAL PERIOD

The statistical period that corresponds to the item value in the data table.

PERCENT CHANGE

The percentage change in an item value between the current and prior stat period.

- Calculated as (C - P) / P * 100 (where 'C' = current stat period item value and 'P' = prior stat period item value).

- This value will be displayed for all stat periods selected.

- Percentage may be shown at the "total" level or at an individual ID-level.

PERCENT OF TOTAL

The percentage of the item total contributed by an individual ID in a given stat period.

NAME1

- Name of the respondent which corresponds to the ID displayed in column 1. NAME1, if selected, will always display in the last column of the data table.

• This field is not correctable.
• You must access the Control Information screen to make changes to the Name field. (Access the Control Information screen by pressing Ctrl-C, or use the GOTO pmenu option.)

4.4.6   MAKING CORRECTIONS

• You can correct the <u>edited</u> version of the data provided:

   1. You have the proper privileges to correct data (DATAPRIV = 'U' or 'P').
   2. The data item is specified in the Item Data Dictionary as being a correctable field (CORFLG = 'U' or 'P').
   3. The stat period is specified in the VSTATP file as being a correctable stat period.

   An error message will display if you attempt to correct a field that is not correctable or if you do not have the proper privileges.

• Click on the data field you want to correct to access the Single Item Update screen:

Figure 4.4.5   Single Item Update

   1. The current ID, item, and stat period are displayed. These fields are not correctable.

   2. Key the new value for the item in the Value field and press <ENTER>.

   3. The data flag window will display. Press <ENTER> to accept the default data flag of "A" ('analyst correction'), or select a different flag using the mouse.

   4. You have the option of entering an imputation action flag (IMPACT). The imputation action

flag controls whether an item value is to be imputed. Values include:

blank	Follow imputation rules to determine whether to impute or not (default)
Y	Impute, regardless of imputation rules
N	Do NOT impute, regardless of imputation rules (even if failure)
X	Follow rules to impute, but exclude from imputation base

Note: You are not required to enter a value in the IMPACT field.

5.   Click on the UPDATE button to apply the correction.

6.   Press <CANCEL> to cancel the update. The item will revert to its original data value.

● Any correction that you make is immediately applied to the database.

● An audit trail will be created for all corrections applied to the database. The following fields will be included in the audit trail:

SURVEY	Survey name
STATP	Statistical period
ID	Case ID
ITEM	Item code/mnemonic
OLDFLAG	Data flag before change
NEWFLAG	Data flag after change
OLDVAL	Value of item before change
NEWVAL	Value of item after change
USRNME	Name of user who made the change
PRGNME	Name of program to update the value
PRGDTM	Date/time the update took place

● To access the Item Audit Trail:

1.   Click on "Item Data" from the GOTO pmenu.
2.   Click on "Audit Trail".
3.   Choose "Item Audit by ID" or "Item Audit by Date".

NOTE: SEE CHAPTER 4.11 FOR MORE INFORMATION ON THE ITEM AUDIT TRAIL.

P-Menus

P-Menu	Options	Function
UTILITIES	Next item (F5) Previous item (F4) Next page (PgDwn) Previous page (PgUp) First item Last item Print Save Temporary Item Data Set	Access next item record Access previous item record Access next screen of item data Access previous screen of item data Access first item record Access last item record Print ID by Item screen[1] Saves id set created by where clause

GOTO	Control Data➤ Control Information
	       Status Changes
	       Mail Group
	       Audit Trail ➤Control Audit by ID
	           Control Audit by Date
	
	Item Data➤ ID by Item
	      ID by Item CP
	      ID Matrix
	      Historical Data➤ Single Item
	           One or More Items
	      Audit Trail➤ Item Audit by ID
	          Item Audit by Date
	
	Roster Data➤ Roster Item Matrix
	      Audit Trail➤ Roster Audit by ID
	          Roster Audit by Date
	
	Respondent Text
		Access Control Information screen for selected ID
		Access Status Changes screen for selected ID
		Access Mail Group screen
		Access Control Audit by ID screen for selected ID
		Access Control Audit by Date screen
		
		Access ID by Item screen for selected ID
		Access ID by Item CP screen for selected ID
		Access ID Matrix screen for selected ID
		Access Historical Data screen for a single item
		Access Historical Data screen for one or more items
		Access Item Audit by ID screen for selected ID
		Access Item Audit by Date screen
		
		Access Roster Audit by ID screen for selected ID
		Access Roster Audit by Date screen
		
		Access Respondent Text screen for selected ID

HELP	Item by ID Help (F1) WhoamI (F7)	Display HELP information on using the ID by Item screen Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

[1] Selecting the 'print' option will access the SAS Output window. Click on the 'File' pmenu and select the 'Print' option. The SAS Print screen will display. Click on the 'Print' button. Close the SAS Output window.